




BFFS Offline Client
Pension and Fiduciary Service
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Objectives

- Recall the purpose of BFFS Offline Client
- Explain installation and set-up
- Demonstrate navigation
- Recognize features not available in Offline status
- Identify personal safety techniques


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References


- FPG, 01 – BFFS – Outlook Offline Client
- BFFS Offline Client [video](#)
- [yourIT Services](#)
- Enterprise Service Desk

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 **Purpose of Offline Client**


- Copies a Subset of the BFFS Database
 - All cases assigned to field examiner (FE) available
- Allows FE to Work Offline
 - Type cases during interview
 - Remove duplication of efforts
- Synchronizes with Server When Online
 - Type information in Offline status and information uploads in Online status

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 **Offline Client Set Up**

- Contact [yourIT Services](#) or Enterprise Service Desk
- CRM 2015 for Outlook Offline Client
 - Install remotely if never had CRM
 - Install in person if have previous version of CRM


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 **Navigation**


- Accessing BFFS Offline Client
 - Microsoft Outlook
 - BFFS Option
- Before going Offline
 - Allot time to synchronize local data with BFFS
 - Time between Offline sessions will affect future synchronization time




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 **Navigation - Continued**


- Going Offline
 - Synchronize with the BFFS database
 - Microsoft Outlook's toolbar File
 - Microsoft Outlook's toolbar CRM
- Going Online
 - Synchronize new information with BFFS database
 - Microsoft Outlook's toolbar File
 - Microsoft Outlook's toolbar CRM




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 **Offline Reporting**


- Reviewing caseload
- Assessing work items
- Editing FELux




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 **Features Not Available Offline**

- FE Cluster Map Dashboard
- Work item workflows





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 **Safeguards**


- Personal Safety
 - Environment
 - Audience
- Equipment Protection
 - Do not leave equipment unattended
 - Store equipment in locked briefcase or in trunk of vehicle

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 **Questions?**



- Purpose of Offline Client
- Offline Client Set Up
- Navigation
- Navigation Cont'd
- Offline Reporting
- Features Not Available Offline
- Safeguards

 **TMS Survey and Assessment**

- An assessment and satisfaction survey have been assigned to you in TMS .
- You should be able to complete the survey and assessment within ten minutes
- Be sure to complete the survey and assessment to receive credit for this training.

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